

Corres

Improve quality  
Eliminate and prevent unnecessary pprwrk  
Reduce cost of creating paperwork

File Keeping

Files, supplies and equipment  
File systems and classification

Cut costs through/ substitutes for dictated corres, eliminate waste, non-essential copies, simplify mail control procedures.

Published HB, revised one drafted

Encourage use of route ~~signs~~ slips  
Standardize envelopes, mail receipts  
Form letters,  
Booklets on Plain letters, Forms, and Guide letters.

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Movie on Corres and Moving the Mail

Points obtained from reviewing these movies--

Corres practices

cut down on copies  
why so many copies of each letter  
info copies--extra work, need to be read, filed and disposed of  
limit info copies for those who need to know  
don't make personal copy  
don't fill up reader file

Don't nit-pick

Delegate responsibility to subordinate--no need to check his work  
Unnecessary reviews--let people responsible for prep letters sign them

Don't delay letters to check clearances

Don't prepare drafts in long hand--use dictating machines or stenos who are faster than writing

Use memos instead of letters; use short memo reply; write on bottom of incoming letter

Use form and guide letters make a copy of the letter if necessary for file

analyze mail and prepare form letters or  
pre-printed letters

Prepare correspondex for guide paragraphs

Use window envelopes, saves addressing envelope

Put bulk mail in one envelop

use stamp endorsement - easy, short

Use postal cards for short notes, less costly

Use office machines.

Collect copies of every letter written, analyze and prepare pattern paragraphs

## II. STYLES IN DEVELOPING

Basic decision necessary if recd keeping to be well managed. Basic decisions est. record keeping organization, location & control. The Master Files Plan decides who keeps what and where.

### Procedure or steps in Files Planning

1. Gather & study function (learn who does what)
2. Examine ~~phys~~ layout (where are records kept)
3. Decide on organizational coverage (oft times more than one master plan used)

Most important action in fact finding.

4. Inventory the records (Either physically or thru use of recds schedules or questionnaires)
5. Weigh factors & decide (some clear-cut others more complex)
6. Issue as adjunct to recds cont sched. (if oper. officials participate in formulation, file plan more likely to work)

Plan must be administered; and adjusted for funct. changes, ~~using~~ <sup>using</sup> ~~plans~~

Using questionnaires should be used w/caution. If used make simple to fill out & precede with training session explaining what & how. Follow up those not satis<sup>r.</sup> or not clear.

### Planning Files

Records keeping should be meshed with operating needs. Determine what records

Planning Files (continued)

to keep and where to keep them. Important to provide operating official with right records in right places.

Documentation essential. Files are kept primarily for current working use. Incomplete, inaccurate or split records do not make available the whole story for ready reference use. The cost of reference skyrockets when records are not complete at any one place.

Avoid duplication. When justifications are valid, however, duplication of file is unavoidable. Sometimes duplication occurs when two person do not know each has same file.

Too much centralizing of files tends to bring about duplication ~~and~~ also decentralizing too far.

Challenge purpose of the file. In planning files systems & locations consider control & documentation, time, space, Security, Personnel, and Cost.

Files Plan Content

Obj - Files planning seeks maximum use of records needed by <sup>operating</sup> pers to do their job. Better and more accessible records will result when offices eliminate dupl ~~file~~

Files Plan Content (Continued)

files; reduce keeping of nonessential records; fully document files to provide complete records of actions and transactions, policies & procedures; furnish central ref serv to users, and make records easier & quicker to find; and, minimize the effort and cost of keeping files as well as providing ref serv.

When org<sup>timed</sup> or open<sup>policy</sup> changes will effect record keeping, advance notice <sup>should</sup> ~~will~~ be furnished the Records Officer to permit timely revision of the plan.